

Press Release

5 May 2015

## **Launch of first AIM IHT on a UK platform**

**Stellar Asset Management, the provider of UK tax-efficient portfolio services, and Platform One, the UK and international wrap service, have unveiled the first ever AIM IHT service to be available on a UK platform.**

The move means that for the first time advisers using Platform One can integrate AIM IHT portfolios alongside all their other investments, enhancing their client offering and the quality of portfolio reporting.

The Stellar AIM IHT ISA offers investors the well-known income tax and capital gains tax benefits of an ISA – with the added advantage that after just two years the assets are free from inheritance tax (IHT). The portfolio is also available on Platform One outside an ISA wrapper and both variants offer the option of insurance to ensure that on the investor's death the value of the investment has not shrunk – even if the market has fallen.

Stellar Chief Executive Jonathan Gain said: “Until now an adviser wanting to manage all of a client's investments through a platform and use AIM investments for IHT planning has had to buy stocks individually. Now they can offer clients the diversification and expert stock picking you get with a professionally managed service and be confident that the holdings qualify for IHT exemption, removing a significant amount of hassle and risk. Platform One is leading the way on this and the development is bound to attract interest from advisers.”

Stellar has scrapped all initial charges on its AIM IHT ISA and AIM IHT portfolios and created a facility to enable advisers to easily transfer-in any existing general ISAs into the Stellar AIM IHT discretionary managed services on Platform One.

Michael Fordham, MD of Platform One, added: “We are very much at the leading edge of providing a relevant wrap service to the HNW client. Platform One was the first to accept unquoted shares, EIS and Seed EIS investments, as well as alternative investments that cannot be traded easily. Stellar's AIM services have excellent credentials and their addition to our platform will be good news for many of our advisers serving UK clients.”

For further information on this release please contact Jonathan Gain at Stellar on 020 3195 3500, or Michael Fordham at Platform One – 0345 366 5445.

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### **Notes for Editors**

**Stellar Asset Management** specialises in tax-efficient investment services aimed at the advisers of individuals, families and trustees.

Many AIM-listed equities benefit from Business Property Relief. This means that after a holding period of two years they are free of IHT. Investing in qualifying AIM stocks is an attractive way for investors to mitigate IHT risk without having to enter into complex and expensive trust arrangements. Stellar's portfolios are managed by acclaimed stockbroker Pilling & Co and are offered with a comprehensive insurance policy to protect investors from any future loss of value. The policy insures the original value to give investors peace of mind and to ensure beneficiaries always receive the original amount invested as a minimum.

Visit: [www.stellar-am.com](http://www.stellar-am.com)

**Platform One** provides high-quality UK and international Wrap services for top-tier UK financial advisers, multiple family offices, international advisers and specialist service providers. Each of our services delivers a financially secure, high-quality online investment platform, with access to sophisticated and specialist products and services to suit the needs of clients and their advisers.

The availability of separate UK and international services means that client assets can be held in either the UK or offshore as required by the client or the product they hold.

The two offshore services available from Platform One, International and Global, are designed to meet the requirements of advisers and clients in different jurisdictions and markets. The International service provides for client agreed charging with all commissions received rebated to the client. The Global service provides a commission-based platform with no adviser charges.

Platform One provides advisers and their clients with a personal service, contemporary technology and specialist products and services designed for sophisticated investors. Platform One is authorised and regulated by the Financial Conduct Authority, and under MiFID is passported into all 27-member states of the EEA.

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